

RESEARCH OUTLINE  
FOR THE ANALYSIS OF  
MUNICIPALLY-INITIATED  
ANNEXATION ACTIONS IN VIRGINIA  
[Article 1, Chapter 32, Title 15.2, Code of Virginia]

STAFF  
COMMISSION ON LOCAL GOVERNMENT  
COMMONWEALTH OF VIRGINIA  
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## PREFACE

In the utilization of this research outline the following points should be noted:

1. In initiating or responding to an annexation action, local governments are guided principally by the Commission on Local Government's Rules of Procedure, 1984 Edition. While those rules anticipate that the submission by the local governments will be fully responsive to relevant matters, the local governments are permitted to submit such data, exhibits, documents, or other supporting materials as they deem appropriate (Rules 3.2 and 3.4) Thus, local governments are afforded latitude in their collection and submission of data for the Commission's review.
2. Each locality is expected to present data principally in support of its position on an annexation issue. Thus, data required by this research outline will be derived from submissions presented by both of the affected localities.
3. While the initial submissions by the parties should be as comprehensive as possible, they are not required to address all of the data elements included in this research outline. Localities may submit supplemental filings "where such are deemed necessary or appropriate by the Commission for the provision of current and complete data." (Rule 3.28) Thus, supplemental filings may be utilized for the submission of data not available at the time of the initial filing.
4. Certain demographic, economic, and fiscal data are not generally available for towns. Where an element in this research outline is marked by an asterisk (\*), certain data for towns may not be available.
5. Portions of this research outline are applicable only to city annexation issues. Those portions are so noted in the outline.
6. The research outline was developed over the course of a number of years as a tool to assist the staff of the Commission on Local Government in the evaluation of annexation issues initiated by a municipality. The elements contained therein are examples of data the Commission's staff has requested to be provided by parties initiating reviews of such actions in the past.
6. It is understood that capacity of a town to respond to any or all of the data elements in the research outline is directly related to a number of factors, such as the population of the locality, size of its municipal staff and budget, services offered to its citizens, etc.
7. The research outline is not intended to be all encompassing of every possible factor available for the evaluation of annexation issues. Every annexation issue has unique aspects that cannot be captured in a standardized outline.
8. If you have any questions concerning the content of the research outline or the meaning of specific items, you are encouraged to contact the staff of the Commission on Local Government at 804-786-6508.

Issue: \_\_\_\_\_

I. PROCEEDINGS OF COMMISSION

[SECTION I IS FOR USE BY COMMISSION STAFF ONLY]

- A. Date of Official Filing:  
(give date of receipt of notice)
- B. Scope of Action Filed:  
(give nature of action and amount of territory involved; note whether mediation assistance was requested)
- C. Preliminary Action by Commission:  
(give date of initial Commission meeting on issue and action taken)
- D. Original Schedule for Review:  
(give original review schedule established by Commission)
- E. Changes of Schedule (if any):  
(note any changes made after by Commission and give reason for changes)
- F. Mediation Effort:  
(did Commission appoint mediator; when)
- G. Affected Jurisdictions Notified/Invited to Testify:  
(give number of jurisdictions given notice of action by initiating party)
- H. Public Hearing
  - 1. Location and Date
  - 2. Number of Persons Attending and Testifying:
- I. Date of Closing of Record:
- J. Intervenors:  
(list any formal intervenors)
- K. Other Relevant Factors:  
(cite any other factors relevant to the Commission's review)

## II. GENERAL CHARACTERISTICS OF LOCALITIES AND AFFECTED AREAS

### A. Annexing Municipality

1. Founding and History:  
(give date of founding and initial incorporation; briefly list major political and economic events affecting development)
2. Population
  - a. Number  
(give current population; give change and percent of change during decade preceding last census; show change and percent of change since last decennial census; compare population changes in locality with those for the State as a whole)
  - b. Age Distribution:  
(give median age and percent of population 65 and over at last census; compare with same data for preceding decennial census; compare with Statewide data)\*
  - c. Income  
[give median family income; give per capita adjusted gross income (AGI); compare with Statewide data]\*
3. Area  
(give area of locality in square miles)
4. Density of Population:  
(give population density of locality in persons per square mile based on latest population estimate)
5. Employment Profile:
  - a. Nonagricultural Wage and Salary Employment:  
(give most recent data; give data for the fifth previous year; note change during period)\*
  - b. Nonresident Workers:  
(give data on nonresidents working in municipality; identify top three localities of such nonresident workers)\*
  - c. Municipal Residents Working Outside Municipality:  
(give data on municipal residents working in other jurisdictions; identify top three localities of such employment)\*

6. Land Use Data

- a. Distribution of Land Among Use Categories:  
(give acreage and percent of land in each land use category)

<u>Acreage</u>	<u>Percent</u>
Residential	
Commercial	
Industrial	
Public and Semi-public	
Vacant	
Other (List)	

- b. Analysis of Vacant Land:  
(give gross amount vacant land; identify amount and percentage of vacant land restricted in development potential by each environmental factors; list other properties restricted in development potential and state reason)

7. Annexation History:  
(review annexation history; identify the two most recent annexations and specify amount of land area and population incorporated into the municipality as a result of each)
8. Community Facilities Serving General Area:  
(identify major facilities in municipality serving the general area, including hospitals, universities, recreational facilities, State and federal offices)

B. Affected County

1. Founding and History:  
(give date of founding; briefly list major political and economic events affecting development)
2. Population
- a. Number:  
(give current population; give change and percent of change during decade preceding last census; show change and percent of change since last decennial census)

- b. Age Distribution:  
(give median age, and percent 65 and over at last census; compare with same data for preceding decennial census; compare with Statewide data)
  - c. Income:  
(give median family income; give per capita AGI; compare with Statewide data)
  - d. Towns  
(list incorporated communities in county and population of each at time of last decennial census)
- 3. Land Area:  
(give area of locality in square miles)
- 4. Density of Population:  
(give population density in persons per square mile based on last decennial census and/or the latest population estimate; give population density for unincorporated portion of county in persons per square mile based on last decennial census and/or latest population estimate)
- 5. Employment Profile
  - a. Nonagricultural Wage and Salary Employment:  
(give most recent data; give data for the fifth previous year; note change during period)
  - b. Nonresident Workers:  
(give data on nonresidents working in county; identify top three localities of such nonresident workers)
  - c. County Residents Working Outside County:  
(give data on county residents working in other jurisdictions; identify top three localities of such employment)

6. Land Use Data

- a. Distribution of Land and Use Categories:  
(give acreage and percent of land in each land use category)

<u>Acreage</u>	<u>Percent</u>
Residential	
Commercial	
Industrial	
Public and Semi-public	
Vacant	
Other (List)	

7. Agricultural Operations:  
(give data on number of farms in county, aggregate acres farmed, and value of most prominent agricultural product)
8. Forestral Operations:  
(give data on size and significance of forestal activities in county)
9. Community Facilities Serving General Area:  
(identify major facilities in county serving the general area, including hospitals, universities, recreational facilities. etc.)

C. Area Proposed for Annexation (APA)

1. Area:  
(give geographic size of APA; indicate percentage of county's total land area in APA)
2. Population:  
(give population of APA; indicate percentage of county's total population in APA; indicate date of population estimate)
3. Density of Population:  
(give population density of APA in persons per square mile)
4. Property Assessables:  
(give total of assessed values each major category of property in APA; indicate the percentage of county total of each category of property in the APA; indicate date of assessed values estimate)



5. Taxable Sales:  
(give total taxable sales or sales tax revenue in APA; indicate percentage of county total in the APA; indicate date of estimate)
6. Revenue Data:  
(give amount of local revenue generated in ~~APA~~ APA in major category of tax/non-tax revenue; express each amount as a percentage of a county's total for such category; indicate date of estimate)
7. Land Use Data
  - a. Distribution of Land Among Use Categories  
(give acreage and percent of land in each land use category)

<u>Acreage</u>	<u>Percent</u>
Residential	
Commercial	
Industrial	
Public and Semi-public	
Vacant	
Other (List)	
  - b. Analysis of Vacant Land:  
(give gross amount of vacant land; identify amount and percentage of vacant land restricted in development potential by each environmental factor; list other properties restricted in development potential and give reason)
8. Nature of Current Development:  
(describe the major development in APA, listing major industries, commercial areas, subdivisions, county-owned facilities, and municipally-owned facilities)

### III. NEED OF MUNICIPALITY TO STRENGTHEN TAX BASE

#### A. Real Estate and Public Service Corporation Properties

1. True Values:  
[give current true values (or nominal values in the case of a town) in municipality and county; give 1990 true values for both jurisdictions; compare percent growth in true values for jurisdictions from 1990 to current date]
2. Per Capita True Values:  
(give per capita true values for 1990 and for current year for municipality and county; compare change for jurisdictions during the period)
3. Tax Rates:  
[give current effective true real property rate (or nominal rate in the case of a town) for municipality and county; compare change for the two jurisdictions since 1990; compare current municipal true rate with rates for other municipalities of comparable size]
4. Assessables Due to New Construction:  
(give amount of total locally assessed values for municipality and county during past five fiscal years attributable to new construction and not inflation; compare change for jurisdictions during period)

#### B. Taxable Retail Sales

1. Current Total of Taxable Retail Sales:  
(give current total of taxable retail sales in municipality and county; give total of such sales for both jurisdictions in 1990; compare growth of such sales in two jurisdictions during the period)\*
2. Per Capita Taxable Retail Sales:  
(give per capita taxable retail sales for municipality and county for 1990 and current year; compare change for jurisdictions during the period)\*

#### C. Social Stress

1. Population Below Poverty Level:  
(give percent of population beneath official poverty level for municipality and county; compare with Statewide data)\*
2. Public Assistance Case Load:  
(give case load data for municipality and county concerning population receiving food stamps, free school lunches, and other forms of public assistance; cite total local expenditures for welfare/social services for most recent year by municipality and county)\*
3. Unemployment:  
(give most recent data regarding unemployment in municipality and county; compare with Statewide data)\*

D. Fiscal Effort

1. Local-Source Revenue from Principal Sources:  
(calculate for municipality and county four most recent fiscal year total local-source revenue per capita)
2. Tax Effort Based on Representative Tax System:  
(give tax effort measure for municipality and county based on the representative tax system; compare with set of all localities)\*

E. Fiscal Stress

1. Bond Rating:  
(give most recent bond ratings for municipality and county)
2. General Obligation Indebtedness:  
(list outstanding general obligation indebtedness of municipality and county; calculate on a per capita basis; compare municipality's per capita debt to set of comparably sized municipalities)\*
3. Stress Based on Representative Tax System:  
(cite most recent measure of fiscal stress for municipality and county utilizing CLG methodology; compare with set of all localities)\*

#### IV. NEED OF MUNICIPALITY FOR LAND FOR DEVELOPMENT

##### A. Vacant Land

1. Gross Vacant Land:  
(give gross amount of vacant land in municipality in acres; state as percent of total land area in municipality)
2. Net Developable Vacant Land:  
(give amount of vacant land restricted in development potential by major environmental constraints; cite other vacant property restricted in development potential by other specified factors; give total vacant land suitable and available for development)

##### B. Land for Industrial Development

1. Gross Vacant Property Zoned for Industrial Development:  
(give amount of vacant property in municipality zoned for industrial usage)
2. Net Developable Vacant Property Zoned for Industrial Development:  
(give amount of vacant property in municipality zoned for industrial activity but restricted in development potential by specified factors; give net developable vacant property zoned and suitable for industrial usage)
3. Premium Industrial Property:  
(give number of sites and aggregate acreage of developable vacant property located on parcels of ten acres or more zoned for industrial usage)
4. Sites on File with Virginia Department of Economic Development:  
(list number and parcel size of each site in municipality file with Virginia Economic Development Partnership)
5. Industrial Building Permits:  
(give number and aggregate value of industrial building permits issued annually for the construction of new industrial structures during the current and each of the preceding five calendar years in municipality and county)
6. Industrial Development Adjacent to Municipality:  
(cite available data regarding extent of industrial growth in areas adjacent to the municipality)
7. Industrial Development Potential of Areas Adjacent to Municipality and County Generally:  
(present available data regarding potential for industrial growth in areas adjacent to municipality and in county generally)
8. Loss of Industrial Activity in Municipality:  
(give number of industrial firms ceasing operation in municipality during past ten calendar years; cite those relocating in county)

C. Land for Commercial Development

1. Gross Vacant Property Zoned for Commercial Development:  
(give amount of vacant property in municipality zoned for commercial development)
2. Net Developable Vacant Property Zoned for Commercial Development:  
(give amount of vacant property in municipality zoned for commercial development but restricted in development potential by specified factors; give net developable vacant property zoned and suitable for commercial development)
3. Premium Commercial Property:  
(give the number of sites and aggregate acreage of developable vacant property on parcels of three acres or more zoned for commercial usage)
4. Commercial Building Permits:  
(give number and aggregate value of commercial building permits issued annually for the construction of new commercial structures during the current and each of the preceding five calendar years in municipality and county)
5. BPOL Licenses:  
(give the number of BPOL licenses issued by category and BPOL taxes collected annually for each category during the current and preceding five calendar years in municipality and county)
6. Commercial Development Adjacent to Municipality:  
(cite available data regarding extent of commercial growth in areas adjacent to the municipality)
7. Commercial Development Potential of Areas Adjacent to Municipality and County Generally:  
(present available data regarding potential for commercial growth in areas adjacent to the municipality and in county generally)
8. Loss of Commercial Activity in Municipality:  
(give number of commercial firms ceasing operation in municipality during past ten calendar years; cite those relocating in county)

D. Land for Residential Development

1. Gross Vacant Property Zoned for Residential Development:  
(give amount of vacant property in municipality zoned for each zoning category of residential development)

2. Net Developable Vacant Property Zoned for Residential Development:  
(give amount of vacant property in municipality zoned for each zoning category of residential activity which is restricted in development potential by specified factors; give net developable vacant property zoned and suitable for development in each residential zoning category)
3. Residential Building Permits:  
(give number and aggregate value of residential building permits issued for new construction in the categories of single family, multi-family, and mobile home dwelling units during the current and each of the preceding five calendar years in municipality and county)
4. Adequacy of Housing to Retain Heterogeneous Population:  
(give data comparing median age of population, percent of age 65 and over, number of married families with children age 18 and under in municipality, county, and State as a whole; show change in such demographic data for municipality, county, and State as a whole during previous decade)\*
5. Residential Development Adjacent to Municipality:  
(cite available data regarding extent of residential development in areas adjacent to the municipality)
6. Residential Development Potential of Areas Adjacent to Municipality and County Generally:  
(present available data regarding potential for future residential growth in areas adjacent to the municipality and in county generally)
7. Subdivision Lots Platted:  
(give the number of subdivision lots platted in municipality, APA, and county generally during the current and each of the preceding five calendar years)

## V. IMPACT OF ANNEXATION ON COUNTY

- A. Land Area:  
[give geographic size of area proposed for annexation (APA); indicate percentage of county's total land area in APA]
- B. Population  
(give population of APA; indicate percentage of county's total population in APA)
- C. Schoolage Population and ADM:  
[give schoolage population and average daily membership (ADM) in APA; indicate percentage of county's total schoolage population and ADM in APA]\*
- D. Property Assessables:  
(give total assessed values in each major category of property in APA; indicate percentage of county's total of each category of property in APA)
- E. Property Tax Revenue:  
(give total amount of property tax revenue from each major category of property in APA for most recent fiscal year; indicate percentage of county's total revenue collections from such sources in APA during that fiscal year)
- F. Nonproperty Tax Revenue:  
(give total amount of non-property tax revenue in each affected category of local revenue in APA for most recent fiscal year; indicate percentage of county's total in each identified category)
- G. Industrial Impact
  1. Existing Industrial Operations:  
(list those industrial operations in APA employing 50 or more persons; indicate percentage of county's total industrial employment in APA)
  2. Premium Industrial Property:  
(give number of sites and aggregate acreage of developable vacant property and APA located on parcels of ten acres or more zoned for industrial usage; indicate percentage of county's total of such parcels in APA)
  3. Sites on File with Virginia Department of Economic Development:  
(list number and parcel size of each site in APA on file with Virginia Economic Development Partnership; indicate percentage of county's total of such sites in APA)
  4. Industrial Development Potential of County and APA:  
(present available data regarding potential for industrial growth in county and APA; compare industrial growth potential of APA with that of county generally)

H. Retail Trade Impact

1. Number:  
(give number of retail establishments in APA; indicate percentage of county's total retail establishments in APA)\*
2. Employment  
(give number of persons employed in retail trade sector in APA; indicate percentage of county's total retail employment in APA)\*
3. Retail Sales:  
(give total taxable retail sales or sales tax revenue in APA; indicate percentage of county's total in APA)\*
4. Shopping Areas:  
(give location of any major retail trade centers in APA)
5. Premium Commercial Property:  
(give number of sites and aggregate acreage of developable vacant property in APA located on parcels of three acres or more zoned for commercial usage; indicate percentage of county's total of such parcels in APA)
6. Commercial Development Potential of County and APA:  
(present available data regarding potential for commercial growth in county and APA; compare commercial growth potential of APA with that of the county generally)

I. Impact on County Facilities (Includes Independent Authority)

1. Water Supply and Distribution
  - a. Water Supply and Treatment Facilities:  
(list each county/authority-owned water supply or treatment facility located in APA)
  - b. Distribution System:  
(give total miles of county/authority-owned water distribution lines in APA; give total number of connections to county/authority-owned water lines in APA; indicate percentage of county's total water lines and connections in APA)
  - c. Storage Facilities:  
(give number and aggregate capacity of county/authority-owned storage facilities in APA)
  - d. Ability to Serve Remaining Portion of County:  
(if the municipality proposes acquisition of county/authority's water supply and distribution facilities in APA, describe impact of loss of such facilities on ability of county/authority to serve remaining portion of county)



2. Sewage Collection and Treatment

- a. Treatment Facilities:  
(list each county/authority-owned sewage treatment facility located in APA)
- b. Collection System:  
(give total miles of county/authority-owned sewage collection lines in APA; give total number of connections to county/authority-owned collections in APA; indicate percentage of county's total collection lines and connections in APA)
- c. Ability to Serve Remaining Portion of County:  
(if municipality proposes acquisition of county/authority's sewage collection and treatment facilities in APA, describe impact of loss of such facilities on ability of county/ authority to serve remaining portion of county)

3. Educational Facilities:

(give number of public school students residing in APA, and give number of such students attending each county school; if acquisition of county schools in APA is proposed by city, describe impact on county system; if proposed annexation involves a town, describe impact on county schools resulting from any prospective increase in intensity of development in APA due to annexation)\*

4. Other County Facilities:

[list each county/authority-owned facility (such as libraries, parks, solid waste disposal sites) located in APA; if acquisition of any facility is proposed by the municipality, describe the impact of the loss of such facilities on county/authority's ability to serve the remaining portion of county; if proposed annexation involves a town, describe impact on such county facilities resulting from any prospective increase in intensity of development in APA due to annexation]

J. Financial Settlement Provisions

- 1. Assumption of County Debt (Applicable to Cities Only):  
(give percentage and total amount of county's long-term general obligation debt to be assumed by city as calculated by municipality and county; give components of debt figure; describe methodological bases utilized by county and city, respectively, for determining percentage of debt to be assumed by city)
- 2. Loss of Net Revenue (Applicable to Cities Only):  
(give total annual dollar amount of county's loss of net tax revenue to be paid by city as calculated by municipality and county; give amount of each affected revenue source; describe methodology utilized by county and city, respectively, to determine amount of each affected revenue source)

3. Purchase of County Facilities:  
(list each county/authority-owned facility in APA to be purchased by municipality, as proposed by the municipality and/or the county; give purchase cost of each facility as calculated by municipality and county, respectively; describe methodology utilized by municipality and county, respectively, to determine purchase cost)

## VI. URBAN SERVICES

### A. Sewerage

#### 1. Municipality

##### a. Treatment Facilities

- 1) Description of Facilities:  
(list each treatment facility serving the municipality; give location, type, and level of treatment of each)
- 2) Construction and Past Expansions:  
(give date of construction and major expansion of each facility)
- 3) Capacity of Facilities:  
[give Department of Environmental Quality/Department of Health (DEQ/DOH) approved capacity of each in million gallons per day (MGD)]
- 4) Current Utilization of Facilities:  
(give average daily flow in MGD for most recent calendar year at each facility; calculate current excess capacity of each)
- 5) Proposed Expansions or Upgrading:  
(discuss any propose expansion or upgrading of treatment facilities; give proposed improvement schedule and projected cost)
- 6) Problems with Treatment Process:  
(identify any problems with treatment plant process at any facility occurring within last five calendar years)

##### b. Collection System

- 1) Size of System:  
(give total miles of municipally-owned collection lines in entire system; give total miles of municipally-owned lines in municipality, in other jurisdictions, and in APA specifically)
- 2) Connections Served:  
(give total number of sewer connections to municipal lines; give total number of such connections within municipality, in other jurisdictions, and in APA specifically)
- 3) Municipal Population Served:  
(give approximate percentage of municipality's population connected to central sewage treatment facilities)

- 4) Municipal Areas Not Served:  
(identify areas within municipality not served by central sewerage service; indicate any areas designated by DOH as health hazard areas)
  - 5) Pump Stations:  
(give number and location of each pump station serving municipal system)
  - 6) Proposed Improvements to Collection System:  
(describe any planned or proposed improvements to collection system; give improvement schedule and projected cost of each)
  - 7) Infiltration and Inflow Problems:  
(discuss any infiltration of groundwater and inflow of storm water problems experienced by collection system; discuss actions undertaken or planned to address infiltration and inflow problems, including amount of locality's funds used to correct existing problems in each of the previous five fiscal years)
  - 8) Connection Policy:  
(describe municipality's mandatory connection policy)
  - 9) Fees and Charges:  
(list sewer connection fees, availability fees, and service charges for each category of user; give the year of the last five increases in such fees and/or charges)
  - 10) Areas Not Served with Sanitation Problems:  
(identify any portion of area in municipality's environs designated by DOH as health hazard area or with significant incidence of septic tank failure; identify any of those areas served by public utilities)
- c. Interlocal Agreements:  
(describe nature and significance of any interlocal agreement or contract affecting sewage collection and treatment system of municipality)
  - d. Municipal Plans to Serve Area Proposed for Annexation (APA):  
(describe municipality's plans to serve APA; list all projects, their anticipated costs, and implementation schedule)
  - e. Impact on Sewer Enterprise Fund  
[give fiscal impact of annexation on operating portion of sewer enterprise fund; explicitly state all assumptions (e.g., where data are projected, future growth in connections, increases in utility rates, etc.)]

2. County (includes Independent Authority)

a. Treatment Facilities

- 1) Description of Facilities:  
(list each treatment facility serving the county; give location, type, and level of treatment of each; indicate which facilities, if any, serve the APA)
- 2) Construction and Past Expansions:  
(give dates of construction and major expansion of each facility)
- 3) Capacity of Facilities:  
(give DEQ/DOH approved capacity of each in MGD)
- 4) Current Utilization of Facilities:  
(give average daily flow in MGD for most recent calendar at each facility; calculate current excess capacity of each)
- 5) Proposed Expansions or Upgrading:  
(discuss any propose expansion or upgrading of treatment facilities; give proposed improvement schedule and projected cost)
- 6) Problems with Treatment Process:  
(identify any problem with treatment plant process occurring at any facility within last five calendar years)

b. Collection System

- 1) Size of System:  
(give total miles of county/authority-owned collection lines; give total miles of county or authority-owned collection lines in each component of APA)
- 2) Connections to System:  
(give total number of sewer connections to county/authority-owned lines; give total number of sewer connections to county/authority-owned lines in each component of APA)
- 3) Population Served in APA:  
(identify portions of APA served by county/authority lines; give approximate percentage of population in each component of APA with residences connected to county/authority central sewage treatment facilities)

- 4) Areas Not Served in APA with Sanitation Problems:  
(identify any portion of APA designated by DOH as health hazard area; identify other areas in APA with significant incidence of septic tank failure)
  - 5) Pump Stations:  
(give number and location of each pump station serving county/authority system)
  - 6) Proposed Improvements to Collection System:  
(describe any planned or proposed improvements to collection system; give improvement schedule and projected cost of each)
  - 7) Infiltration and Inflow Problems:  
(discuss any infiltration of groundwater and inflow of stormwater problems experienced by collection system; discuss actions undertaken or planned to address infiltration and inflow problems, including amount of locality's funds used to correct existing problems in each of the previous five fiscal years)
  - 8) Connection Policy:  
(describe the county/authority mandatory connection policy)
  - 9) Fees and Charges:  
(list connection fees, availability fees, and service charges for each category of user; give the year of the last five increases in such fees and/or charges)
- c. Interlocal Agreements:  
(describe nature and significance of any interlocal agreement or contract affecting sewage collection and treatment system of county/authority)
3. Area Proposed for Annexation
- a. Private Treatment and Collection Facilities:  
(describe any private sewage collection and treatment facilities in APA which serve major commercial or industrial facilities, or five or more dwelling units; give approximate percentage of population in APA connected to central sewage treatment facilities operated by private entities; identify subdivisions and communities served by such systems)

b. Population Served by Public Systems

1) By Municipal System:

(give approximate percentage of population in APA connected to municipality's central sewage treatment facilities; identify subdivisions and communities served by the municipal system)

2) By County/Authority System:

(give approximate percentage of population in APA connected to county/authority central sewage treatment facilities; identify subdivisions and communities served by the county/authority system)

c. Health Hazard Area:

(identify any portion of APA designated by DOH as health hazard area or which have experienced notable septic tank failure problems within the past five years; identify which areas are served by public utilities.)

d. Septic Tank Suitability

(identify any portion of APA where soil conditions or lot sizes restrict the installation, repair, replacement, or expansion of septic tank drainfields)

B. Water

1. Municipality

a. Water Sources

1) Raw Water Sources:

[give name and location of each raw water source utilized; give DOH approved capacity in MGD of each source; give average daily flow in MGD for most recent calendar year at each source]

2) Potable Water Sources:

[give name and location of each potable water source (e.g., wells, springs, etc.) utilized; give DOH approved capacity of each in MGD; give average daily flow in MGD for each during most recent calendar year]

b. Treatment Facilities

1) Number and Description:

(give number and location of each treatment facility utilized; give date of construction and major expansions of each)

- 2) Treatment Capacity and Water Flow:  
(give DOH approved capacity in MGD of each treatment facility; give average daily flow in MGD for most recent calendar year experienced at each)
- c. Proposed Expansion or Upgrading of Sources and Treatment Facilities:  
(discuss any proposed expansion or upgrading of raw or potable water sources and/or treatment facilities; give proposed improvement schedule and projected cost)
- d. Distribution System
  - 1) Storage Facilities for Potable Water:  
(give location, type, and capacity of each storage facility used for potable water)
  - 2) Size of System:  
(give total miles of municipally-owned water distribution lines in municipal system; give total miles of municipally-owned water distribution lines within the municipality, in other jurisdictions, and in APA specifically)
  - 3) Connections Served:  
(give total number of connections served by municipal water lines; give total number of connections served within the municipality, in other jurisdictions, and in APA specifically)
  - 4) Municipal Population Served:  
(give approximate percentage of municipality's population connected to central water distribution facilities)
  - 5) Municipal Areas Not Served:  
(identify areas within municipality not served by central water distribution system)
  - 6) Proposed Improvements to Distribution System:  
(describe any planned or proposed improvements to the municipal water distribution system; give improvement schedule and projected cost)
  - 7) Problems With Distribution System:  
(indicate magnitude and significance of water loss in distribution system; describe problems resulting from low pressure in lines and any fire flow concerns; identify all areas subject to such problems; give location and extent of all water lines in system with diameter of two inches or less)
  - 8) Well Contamination Problems:  
(describe any well contamination problems in municipality)



- 9) Connection Policy:  
(describe municipality's mandatory water connection policy)
  - 10) Fees and Charges:  
(list water connection fees, availability fees, and service charges for each category of user; give the year of the last five increases in such fees and/or charges)
- e. Interlocal Agreements:  
(describe nature and significance of any interlocal agreement or contract affecting the water system of municipality)
  - f. Municipal Plans to Serve APA:  
(describe municipality's plans to serve APA; list all projects, their anticipated costs, and implementation schedule)
  - g. Impact on Water Enterprise Fund  
[give fiscal impact of annexation on operating portion of water enterprise fund; explicitly state all assumptions (e.g., where data are projected, future growth in connections, increases in utility rates, etc.)]
2. County (includes Independent Authority)
    - a. Water Sources
      - 1) Raw Water Sources:  
(give name and location of each raw water source utilized; give DOH approved capacity in MGD of each source; give average daily flow in MGD for most recent calendar year at each source; indicate which facilities, if any, serve the APA)
      - 2) Potable Water Sources:  
(give name and location of each potable water source, e.g., wells, springs, etc., utilized; give DOH approved capacity of each in MGD; give average daily flow in MGD for each during most recent calendar year; indicate which facilities, if any, serve the APA)
    - b. Treatment Facilities
      - 1) Number and Description:  
(give number and location of each treatment facility utilized; give date of construction and major expansions of each; indicate which facilities, if any, serve the APA)
      - 2) Treatment Capacity and Water Flow:  
(give DOH approved capacity in MGD of each treatment facility; give average daily flow in MGD for most recent calendar year experienced at each)

- c. Proposed Expansion or Upgrading of Sources and Treatment Facilities:  
(discuss any proposed expansion or upgrading of raw or potable water sources and/or treatment facilities; give proposed improvement schedule and projected cost)
- d. Distribution System
  - 1) Storage Facilities for Potable Water:  
(give location, type, and capacity of each storage facility used for potable water)
  - 2) Size of System:  
(give total miles of lines in county/authority water distribution system; give total miles of county/authority water distribution lines in county, give total miles of county/authority water distribution lines in each component of the APA )
  - 3) Connections Served:  
(give total number of connections served by county/authority water lines; give total number of connections to county/authority lines in each component of the APA)
  - 4) Population Served in APA:  
(give approximate percentage of population in APA connected to county/authority water distribution facilities)
  - 5) Areas Not Served in APA with Water Problems:  
(describe any portions of APA not served by central water distribution; identify any communities in such portion of APA with failing wells or contaminated water supply)
  - 6) Proposed Improvements to Distribution System:  
(describe any planned or proposed improvements to water distribution system; give improvement schedule and projected cost)
  - 7) Problems With Distribution System:  
(indicate magnitude and significance of water loss in distribution system; describe problems resulting from low pressure in lines and any fire flow concerns; identify all areas subject to such problems; give location and extent of all water lines in system with diameter of two inches or less)
  - 8) Well Contamination Problems:  
(describe any well contamination problems in APA and county generally)

- 9) Connection Policy:  
(describe county/authority mandatory water connection policy)
  - 10) Fees and Charges:  
(list water connection fees, availability fees, and service charges for each category of user; give the year of the last five increases in such fees and/or charges)
  - e. Interlocal Agreements:  
(describe nature and significance of any interlocal agreement or contract affecting the water system of county/authority)
3. Area Proposed for Annexation (APA)
- a. Population Served by Privately Owned Central Systems:  
(describe any private water facilities in APA which serve major commercial or industrial facilities, or five or more dwelling units; give approximate percentage of population in APA connected to such systems; identify subdivisions and communities served by such systems)
  - b. Population Served by Public Systems
    - 1) By Municipal System:  
(give approximate percentage of population in APA connected to municipality's water distribution system; identify subdivisions and communities served by the municipal system)
    - 2) By County or Authority System:  
(give approximate percentage of population in APA connected to county/authority water distribution system; identify the subdivisions and communities served by the county/authority system)
  - c. Population Not Served by Central Systems:  
(identify any portion of APA not served by central water systems; estimate percentage of population in APA living in such areas)
  - d. Problems in Central Systems Serving APA:  
(describe any low pressure or fire flow problems in the various systems serving APA; identify areas with such problems; give location and extent of all water lines in systems serving the APA with diameter of two inches or less)
  - e. Well Contamination Problems:  
(identify any well contamination problems in APA)

C. Solid Waste

1. Municipality

a. Municipal Collection System

- 1) Description of System:  
(describe frequency and nature of municipal collection service for residential, commercial, and industrial properties; describe any special solid waste collection services offered by locality, e.g., leaf collections, large item pick-up, bulk-container collections)
- 2) Municipal Staff:  
(give number of full-time and part-time employees of municipality engaged in solid waste collection)
- 3) Municipal Equipment:  
(give number and type of equipment utilized by municipality in solid waste collection)
- 4) Funding of Municipal Service:  
[identify source of funding for municipal service (i.e., user charges or general fund revenue); if service is funded by user charges, explain fully the fee structure; give annual magnitude of any general fund subsidy]
- 5) Service Area  
(indicate any areas receiving solid waste collection services beyond the municipality's current borders)

b. Private Collection Systems

- 1) Description of Systems:  
(give number of private collection firms engaged in solid waste collection in municipality; give the total number of employees and equipment utilized by each firm)
- 2) Service Areas, Collection Schedules, and Fee Structure:  
[delineate the service areas assigned to the private collection firms, their collection schedules, number of customers (if residential service is provided) and their fee structure]

- c. Regulation of Private Collectors:  
(describe regulations imposed by municipality on private solid waste collection firms)

d. Municipal Refuse Disposal

- 1) Sites  
(give location of all DOH-approved disposal sites/landfills utilized by municipality or its residents; give remaining life-span of each)
- 2) Municipal Staff:  
(give number of full-time and part-time employees of municipality engaged in solid waste disposal)
- 3) Municipal Equipment:  
(give number and type of equipment utilized by municipality in solid waste disposal)
- 4) Fees:  
(list disposal fees or charges for all categories of users of municipal landfills)
- 5) Permit Violations and Performance Evaluation:  
(describe any violation of DOH landfill permit occurring within five previous calendar years and explain actions taken or planned to correct violations; give results of last State performance evaluation)

e. Proposed Expansion of Disposal Sites or Services:  
(discuss any proposed expansion of disposal site or services; give proposed improvement schedule and projected cost)

f. Interlocal Agreements:  
(describe nature and significance of each interlocal agreement affecting the solid waste collection or disposal services of municipality)

g. Impact on Solid Waste Enterprise Fund  
[if solid waste collection services are provided beyond current municipal borders, give fiscal impact of annexation on operating portion of solid waste enterprise fund; explicitly state all assumptions (e.g., where data are projected, future growth in customers, increases in collection fees, etc.)]

h. Municipal Plans to Serve APA:  
(describe municipality's plans to serve areas annexed; cite number of proposed new employees; indicate equipment to be acquired, and funds to be expended for extension of service)

2. County (includes Independent Authority)

a. County or Authority Collection System

- 1) Description of System:  
(describe frequency and nature of county/authority collection service to residential, commercial, and industrial properties; describe any special solid waste collection services offered by county/authority, e.g., leaf collections, large item pickup, bulk container collections)
- 2) County/Authority Staff:  
(give number of full-time and part-time employees of county/ authority engaged in solid waste collection)
- 3) County/Authority Equipment:  
(give number and type of equipment utilized by county/ authority in solid waste collection)
- 4) Funding of Service:  
[identify source of funding for county/authority service (i.e., user charges or general fund revenue); if service is funded by user charges, explain fully the fee structure; give annual magnitude of any general fund subsidy]

b. Private Collection Systems

- 1) Description of Systems:  
(give number of private collection firms engaged in solid waste collection in county; give the total number of employees and equipment utilized by each firm)
- 2) Service Areas, Collection Schedules, and Fee Structure:  
[delineate the service areas assigned to the private collection firms, their collection schedules, number of customers (if residential service is provided) and their fee structure]

c. Regulation of Private Collectors:  
(describe regulations imposed by county on private solid waste collection firms)

d. County/Authority Refuse Disposal

- 1) Sites  
(give location of all DOH-approved disposal sites/landfills utilized by the county/authority; give remaining lifespan of each)

- 2) County/Authority Staff:  
(give number of full-time and part-time employees of county/authority engaged in solid waste disposal)
- 3) County/Authority Equipment:  
(give number and type of equipment utilized by county/authority in solid waste disposal)
- 4) Fees:  
(list disposal fees or charges for all categories of users of county/authority landfills)
- 5) Permit Violations and Performance Evaluation:  
(describe any violation of DOH landfill permit occurring within previous five calendar years and explain actions taken or planned to correct violations; give results of last State performance evaluation)
- e. Proposed Expansion of Disposal Sites or Services:  
(discuss any proposed expansion of disposal site or services; give proposed improvement schedule and projected cost)
- f. Interlocal Agreements:  
(describe nature and significance of each interlocal agreement affecting the solid waste collection or disposal services of county or authority)
3. Area Proposed for Annexation (APA)
  - a. Collection Service in APA
    - 1) Entities Serving APA:  
(list all public and private entities serving APA; describe areas served by each; describe frequency, nature of service, and charges imposed by each entity; cite all special services, e.g., leaf collections, large item pick-ups, and any additional charges for such)
    - 2) Bulk Containers:  
(give number and location of all publicly-funded bulk containers in or within five road-miles of APA)
    - 3) Disposal Sites:  
(give location of all DOH-approved disposal sites in or readily accessible to residents of APA)

D. Planning, Zoning, and Subdivision Regulation

1. Municipality

a. Planning

- 1) Planning Commission:  
(give date of establishment of municipal planning commission)
- 2) Comprehensive Plan:  
(give date of adoption of current comprehensive plan; give date of last formal review of comprehensive plan by planning commission since adoption, as required by Section 15.2-2230, Code of Virginia)
- 3) Subsidiary Planning Instruments:  
(list, describe, and give dates of adoption of all subsidiary planning instruments such as capital improvement plan, official map, thoroughfare plan, parks and recreation plan, etc.)
- 4) Planning Staff:  
(give number and type of employees on the municipal planning staff)
- 5) Evaluation of Planning Instruments and Activities:  
(identify any deficiencies in comprehensive plan, in other planning instruments, or in planning activities; describe strengths of municipal planning instruments and effort)
- 6) Participation on Planning District Commission:  
(if municipality is currently a member of planning district commission, state name of commission and give date municipality became a member)

b. Zoning

- 1) Adoption and Amendment of Ordinance:  
(give date of adoption of current zoning ordinance; give date of last major revision of ordinance)
- 2) Description of Ordinance:  
(list and provide description of each type of zone authorized by ordinance)
- 3) Administration of Ordinance:  
(give number of employees administering municipal zoning ordinance; note if separate from planning staff)



- 4) Evaluation of Ordinance:  
[list deficiencies in ordinance (e.g., protection of agricultural operations, sign control, etc.); cite notable attributes]

c. Subdivision Ordinance

- 1) Adoption and Amendment of Ordinance:  
(give date of adoption of current subdivision ordinance; give date of last major revision of ordinance)
- 2) Breadth of Coverage:  
(describe types of subdivisions exempted from ordinance)
- 3) Curbs, Gutters, Sidewalks, and Stormdrains:  
(cite provisions in subdivision ordinance related to curbs, gutters, sidewalks, and stormdrains)
- 4) Private Streets:  
(cite provisions in subdivision ordinance related to private roads or streets)
- 5) Administration of Ordinance:  
(give number of employees administering municipal ordinance; note if separate from planning staff)
- 6) Evaluation of Subdivision Ordinance:  
(list deficiencies in ordinance, e.g., subdivisions exempted from review process; cite notable attributes)

2. County

a. Planning

- 1) Planning Commission:  
(give date of establishment of planning commission)
- 2) Comprehensive Plan:  
(give date of adoption of current comprehensive plan; give date of last formal review of comprehensive plan by planning commission since adoption, as required by Section 15.2-2230, Code of Virginia)
- 3) Subsidiary Planning Instruments:  
(list, describe, and give dates of adoption of all subsidiary planning instruments such as capital improvement plan, official map, thoroughfare plan, parks and recreation plan, etc.)

- 4) Planning Staff:  
(give number of type employees on county's planning staff)
- 5) Evaluation of Planning Instruments and Activities:  
(identify any deficiencies in comprehensive plan, in other planning instruments, or in planning activities; describe strengths of municipal planning instruments and effort)
- 6) Participation on Planning District Commission:  
(if county is currently a member of planning district commission, state name of commission and give date county became a member)

b. Zoning

- 1) Adoption and Amendment of Ordinance:  
(give date of adoption of current zoning ordinance; give date of last major revision of ordinance)
- 2) Description of Ordinance:  
(list and provide description of each type of zone authorized by ordinance)
- 3) Administration of Ordinance:  
(give number of employees administering county zoning ordinance; note if separate from planning staff)
- 4) Evaluation of Ordinance:  
[list deficiencies in ordinance (e.g., protection of agricultural operations, sign control, etc.); cite notable attributes]

c. Subdivision Ordinance

- 1) Adoption and Amendment of Ordinance:  
(give date of adoption of current subdivision ordinance; give date of last major revision of ordinance)
- 2) Breadth of Coverage:  
(list types of subdivisions exempted from ordinance)
- 3) Curbs, Gutters, Sidewalks, and Stormdrains:  
(cite provisions in subdivision ordinance related to curbs, gutters, sidewalks, and stormdrains)
- 4) Private Streets:  
(cite provisions in subdivision ordinance related to private roads or streets)

- 5) Administration of Ordinance:  
(give number of employees administering county ordinance; note if separate from planning staff)
- 6) Evaluation of Subdivision Ordinance:  
[list deficiencies in ordinance (e.g., subdivisions exempted from review process); cite notable attributes]

E. Crime Prevention and Detection

1. Municipality

- a. Law Enforcement Personnel:  
[give total number of full- and part-time sworn law enforcement personnel serving the municipal law enforcement agency; give the number of civilian and auxiliary personnel serving the municipal law enforcement agency; give structure of law enforcement agency staff (e.g., types of positions); give ratio of sworn law enforcement officers to population of municipality]
- b. Patrol Services
  - 1) Patrol Personnel:  
(give number of sworn law enforcement officers regularly and routinely assigned patrol responsibility; give ratio of patrol officers to population of locality)
  - 2) Description of Patrol Structure:  
(describe patrol structure of locality; give patrol areas, shift hours, patrol officer distribution; give ratio of patrol officers per shift to land area of locality)
  - 3) Calls for Service:  
(give separately the number of emergency and non-emergency calls for service received for current year and for each of the previous five calendar years; give the number of those calls emanating from the APA give ratio of patrol officers to calls for service for each year)
  - 4) Response Times:  
(give average response times for each category of emergency and non-emergency calls for current year and for each of the previous five calendar years)
- c. Crime Prevention
  - 1) Crime Prevention Personnel:  
(give number of full-time and part-time personnel assigned to crime prevention activities)

- 2) Neighborhood Watch Program:  
(give number of neighborhood watch organizations in locality; give number of people in municipality served by neighborhood watches)
- 3) Security Surveys:  
(give number and type of security surveys conducted by municipal officers during most recent calendar year)
- 4) Crime Prevention Presentations:  
(give number and type of crime prevention presentations made by municipal officers during most recent calendar year)
- 5) Other Crime Prevention Programs:  
(describe any other notable crime prevention programs of locality)

d. Recruitment and Advancement of Personnel

- 1) Recruitment of Law Enforcement Personnel:  
(describe entry-level requirements for sworn law enforcement personnel, including testing and psychological evaluation procedures)
- 2) Initial Training:  
(describe basic training program of law enforcement agency; give location and length of training)
- 3) Field Training Program:  
(describe the field training program of law enforcement agency; give length of field training for graduates of basic training program; describe the training program for officers supervising field training; describe the scope and nature of the written directives regarding programs)
- 4) Probation Policy:  
(describe probation policy for new law enforcement officers)
- 5) Advancement Policy  
(describe promotion policy of law enforcement agency and methods used to determine promotion suitability; describe performance evaluation procedure of law enforcement agency)

e. Law Enforcement Training

- 1) State-Mandated Training:  
(determine if all law enforcement officers currently meet the State-mandated biennial in-service training requirement; give average number of hours of State-mandated training hours completed by law enforcement officers during career, exclusive of basic training program)

- 2) State-Certified Instructional Personnel:  
(give number of law enforcement personnel attaining status as State-certified law enforcement instructors)
  - 3) Advanced Training:  
(describe policy for advanced/specialized training of law enforcement personnel and indicate extent to which policy exists in written form; give average number of hours of non-mandated, advanced/specialized training completed by law enforcement officers during career, exclusive of college-level courses)
  - 4) Higher Education Training:  
(describe policy for higher education/college-level training, including incentives and tuition reimbursement; give average number of hours of college-level training completed by law enforcement officers during career; give number, type, and areas of specialization of college-level degrees attained by law enforcement personnel)
- f. Compensation of Law Enforcement Personnel:  
(give salary ranges for law enforcement positions; give description and value of fringe benefits; describe special or incentive pay offered to law enforcement personnel)
- g. Specialized Law Enforcement Services
- 1) Criminal Investigation:  
(describe criminal investigation services provided by law enforcement agency; give number of sworn officers assigned full-time to criminal investigation activities)
  - 2) Traffic Enforcement:  
(describe traffic enforcement activities of law enforcement agency; give number of sworn officers assigned full-time to traffic enforcement activities)
  - 3) Victim/Witness Program:  
(describe victim/witness program of law enforcement agency; give number of personnel assigned full-time to victim/witness activities)
  - 4) Juvenile Services:  
(describe school/juvenile services provided by law enforcement agency; give number of personnel assigned full-time to school/juvenile services)

- h. Emergency Dispatching Services:  
(describe emergency dispatching services available to law enforcement agency; give number of personnel serving as dispatchers; give status of 911 system in locality)
  - i. Law Enforcement Policies and Procedures:  
(determine if law enforcement agency has written policies involving pursuit driving, use of firearms, use of emergency equipment, and traffic enforcement or violations; determine if law enforcement agency has procedures manual)
  - j. Law Enforcement Vehicles:  
(give number and type of vehicles used by law enforcement agency)
  - k. Accreditation Activities:  
(describe efforts undertaken by locality to attain accreditation of law enforcement agency from Commission on Accreditation for Law Enforcement Agencies)
  - l. Law Enforcement Expenditures:  
(give per capita expenditure for law enforcement and traffic control services for most recent fiscal year)
  - m. Interlocal Agreements  
(describe nature and significance of any interlocal agreement or contract affecting law enforcement services of municipality)
  - n. Municipal Plans to Serve Area Proposed for Annexation (APA):  
(describe law enforcement services to be provided to the APA subsequent to annexation; indicate the projected cost for the extension of such services)
2. County (includes Sheriff's Department)
- a. Law Enforcement Personnel:  
[give total number of full- and part-time sworn law enforcement officers serving the county's law enforcement agency; give the number of civilian and auxiliary personnel serving the county's law enforcement agency; give structure of law enforcement agency staff (e.g., types of positions); give ratio of sworn law enforcement officers to population of county]
  - b. Patrol Services
    - 1) Patrol Personnel:  
(give number of sworn law enforcement officers regularly and routinely assigned patrol responsibility; give ratio of patrol officers to population of locality)

- 2) Description of Patrol Structure:  
(describe patrol structure of locality; give patrol areas, shift hours, patrol officer distribution; give number of specialists on duty during each shift; give ratio of patrol officers per shift to land area of locality)
- 3) Calls for Service:  
(give number of emergency and non-emergency calls for service received for current year and for each of the previous five calendar years; give the number of those calls emanating from APA; give ratio of patrol officers to calls for service for each year)
- 4) Response Times:  
(give average response times for each category of emergency and non-emergency calls for current year and for each of the previous five calendar years)

c. Crime Prevention

- 1) Crime Prevention Personnel:  
(give number of full-time and part-time personnel assigned to crime prevention activities)
- 2) Neighborhood Watch Program:  
(give number of neighborhood watch organizations in locality; give number of people in county served by neighborhood watches)
- 3) Security Surveys:  
(give number and type of security surveys conducted by county officers during most recent calendar year)
- 4) Crime Prevention Presentations:  
(give number and type of crime prevention presentations made by county officers during most recent calendar year)
- 5) Other Crime Prevention Programs:  
(describe any other notable crime prevention programs of locality)

d. Recruitment and Advancement of Personnel

- 1) Recruitment of Law Enforcement Personnel:  
(describe entry-level requirements for sworn law enforcement personnel, including testing and psychological evaluation procedures)

- 2) Initial Training:  
(describe basic training program of law enforcement agency; give location and length of training)
- 3) Field Training Program:  
(describe the field training program of law enforcement agency; give length of field training for graduates of basic training program; describe the training program for officers supervising field training; describe the scope and nature of the written directives regarding programs)
- 4) Probation Policy:  
(describe probation policy for new law enforcement officers)
- 5) Advancement Policy:  
(describe promotion policy of law enforcement agency and methods used to determine promotion suitability; describe performance evaluation procedure of law enforcement agency)

e. Law Enforcement Training

- 1) State-Mandated Training:  
(determine if all law enforcement officers currently meet the State-mandated biennial in-service training requirement; give average number of hours of State-mandated training hours completed by law enforcement officers during career, exclusive of basic training program)
- 2) State-Certified Instructional Personnel:  
(give number of law enforcement personnel attaining status as State-certified law enforcement instructors)
- 3) Advanced Training:  
(describe policy for advanced/specialized training of law enforcement personnel and indicate extent to which policy exists in written form; give average number of hours of non-mandated, advanced/specialized training completed by law enforcement officers during career, exclusive of college-level courses)
- 4) Higher Education Training:  
(describe policy for higher education/college-level training, including incentives and tuition reimbursement; give average number of hours of college-level training completed by law enforcement officers during career; give number, type, and areas of specialization of college-level degrees attained by law enforcement personnel)



- f. Compensation of Law Enforcement Personnel:  
(give salary ranges for law enforcement positions; give description and value of fringe benefits; describe special or incentive pay offered to law enforcement personnel)
- g. Specialized Law Enforcement Services
  - 1) Criminal Investigation:  
(describe criminal investigation services provided by law enforcement agency; give number of sworn officers assigned full-time to criminal investigation activities)
  - 2) Traffic Enforcement:  
(describe traffic enforcement activities of law enforcement agency; give number of sworn officers assigned full-time to traffic enforcement activities)
  - 3) Victim/Witness Program:  
(describe victim/witness program of law enforcement agency; give number of personnel assigned full-time to victim/witness activities)
  - 4) Juvenile Services:  
(describe school/juvenile services provided by law enforcement agency; give number of personnel assigned full-time to school/juvenile services)
- h. Emergency Dispatching Services:  
(describe emergency dispatching services available to law enforcement agency; give number of personnel serving as dispatchers; give status of 911 system in locality)
- i. Law Enforcement Policies and Procedures:  
(determine if law enforcement agency has written policies involving pursuit driving, use of firearms, use of emergency equipment, and traffic enforcement or violations; determine if law enforcement agency has procedures manual)
- j. Law Enforcement Vehicles:  
(give number and type of vehicles used by law enforcement agency)
- k. Accreditation Activities:  
(describe efforts undertaken by locality to attain accreditation of law enforcement agency from Commission on Accreditation for Law Enforcement Agencies)
- l. Law Enforcement Expenditures:  
(give per capita expenditure for law enforcement and traffic control services for most recent fiscal year)

3. Area Proposed for Annexation (APA)

- a. Patrol Services:  
(describe county's current patrol structure for APA; delineate patrol areas which includes APA; calculate geographic intensity of service based on patrol structure and staffing)
- b. Calls for Service:  
(give number of emergency and non-emergency calls for service received from APA for current year and each of the previous five calendar years; give ratio of patrol officers to calls for service for APA)
- c. Resident Law Enforcement Officers:  
(give number of county's law enforcement officers residing in APA)
- d. Crime Prevention
  - 1) Neighborhood Watch Organizations:  
(give number and location of neighborhood watch organizations in APA; give number of people in APA served by neighborhood watch organizations)
  - 2) Burglar Alarms:  
(give number and location of businesses in APA with burglar alarms connected to municipality's law enforcement agency; give number and location in APA with alarms connected to county's law enforcement agency)
  - 3) Other Crime Activity:  
(describe any other notable crime prevention activities of county in APA)
- e. Criminal Activity:  
(give location of those portions of APA with greater than average criminal activity)
- f. Municipal Law Enforcement Services:  
(describe any municipal law enforcement services provided on a regular basis to APA)

F. Fire Prevention and Protection

1. Municipality

- a. Fire Suppression Facilities
  - 1) Description of Facilities:  
(give number of fire stations; specify location of each)

- 2) Fire Apparatus:  
[give fire suppression equipment (e.g., engines, pumpers, ladder trucks, brush trucks, tankers, etc.) located at each station; for each piece of fire apparatus, give its model year, tank size, foam and pumping capacity, length of main ladders, and length and diameter of hose]
- 3) Manning Levels:  
(give number of full-time and volunteer personnel assigned to each station; give shift structure for each station)
- 4) Fire Response:  
(delineate first-run response area of each fire station; give average response time to fire calls by each station during current and previous five calendar years)

b. Fire Service Personnel

- 1) Personnel Complement:  
(give number of full-time, volunteer, and civilian personnel serving the municipal fire department; give structure of staff and functions of principal staff components)
- 2) Recruitment of Firefighters:  
(give entry-level requirements for paid firefighters and volunteers)
- 3) Probation Policy:  
(describe probation policy for new firefighters)
- 4) Advancement Policy:  
(give probation policy for new firefighters; give promotion policy of fire department and methods used to determine promotion suitability)
- 5) Compensation Policy:  
(give salary ranges for fire personnel; give description and value of fringe benefits)

c. Fire Services Training

- 1) Training Facilities:  
(give location of training facilities used by fire service personnel; describe major equipment, structures, and staff located at training facility; give source of funding for operating and capital expenses of facility)

- 2) Training Staff:  
(give number of fire personnel assigned full-time responsibility for training; give qualifications for personnel assigned)
- 3) Initial Training Curriculum:  
(describe basic training program for new firefighters or volunteers)
- 4) State-Certified Training:  
(give average number of hours of State-certified training completed by fire personnel during their respective careers; give number of fire personnel attaining each level of State certification)

d. Fire Prevention

- 1) Fire Prevention Personnel:  
(give number of fire personnel assigned full-time responsibility for fire prevention activities and/or fire code enforcement; give number of prevention personnel who have authority to issue warrants and make arrests in accordance with applicable State statutes)
- 2) Fire Code:  
(give date of adoption of locality's fire code)
- 3) ISO Rating:  
[give date of most recent Insurance Services Office (ISO) of Virginia review; delineate the different ISO fire protection classification areas in the locality]
- 4) Fire Preplanning:  
(give examples of locality's fire preplanning activities)
- 5) Virginia Fire Incident Reporting System:  
(give date locality joined the Virginia Fire Incident Reporting System)
- 6) Fire Inspections:  
(give number of formal fire safety inspections conducted during previous calendar year)
- 7) Fire Prevention Programs:  
(give number of formal fire prevention programs presented during previous calendar year)

- e. Emergency Dispatching Services:  
(describe emergency dispatching services available to fire department)

- f. Fire Hydrants:  
(give number and general location of fire hydrants connected to water distribution lines in locality)
  - g. Fire Brigades:  
(give number and sponsor of each organized private fire brigade operating in locality)
  - h. Interlocal Agreements:  
(describe nature and significance of each interlocal agreement or contract affecting fire services in locality)
  - i. Local Expenditures:  
(give per capita local expenditure for fire services for most recent fiscal year)
  - j. Funding Sources:  
[if fire department is funded by more than one jurisdiction, give amount of funds (exclusive of intergovernmental aid) or services each participating locality has contributed to the operating and capital expenses of the fire department for the current and previous five fiscal years]
  - k. Municipal Plans to Serve Area Proposed for Annexation (APA):  
(describe municipality's plans to be extend fire services to areas annexed; list all projects, their anticipated costs, and implementation schedule)
2. County (includes Volunteer Fire Companies)
- a. Fire Suppression Facilities
    - 1) Description of Facilities:  
(give number of fire stations; specify location of each)
    - 2) Fire Apparatus:  
(give fire suppression equipment (e.g., engines, pumpers, ladder trucks, brush trucks, tankers, etc.) located at each station; for each piece of fire apparatus, give its model year, tank size, foam and pumping capacity, length of main ladders, and length and diameter of hose]
    - 3) Manning Levels:  
(give number of full-time and volunteer personnel assigned to each station; give shift structure for each station)
    - 4) Fire Response:  
(delineate first-run response area of each fire station; give average response time to fire calls by each station during current and previous five calendar years)

b. Fire Service Personnel

- 1) Personnel Complement:  
(give number of full-time, volunteer, and civilian personnel serving the municipal fire department; give structure of staff and functions of principal staff components)
- 2) Recruitment of Firefighters:  
(give entry-level requirements for paid firefighters and volunteers)
- 3) Probation Policy:  
(describe probation policy for new firefighters)
- 4) Advancement Policy:  
(give probation policy for new firefighters; give promotion policy of fire department and methods used to determine promotion suitability)
- 5) Compensation Policy:  
(give salary ranges for fire personnel; give description and value of fringe benefits)

c. Fire Services Training

- 1) Training Facilities:  
(give location of training facilities used by fire service personnel; describe major equipment, structures, and staff located at training facility; give source of funding for operating and capital expenses of facility)
- 2) Training Staff:  
(give number of fire personnel assigned full-time responsibility for training; give qualifications for personnel assigned)
- 3) Initial Training Curriculum:  
(describe basic training program for new firefighters or volunteers)
- 4) State-Certified Training:  
(give average number of hours of State-certified training completed by fire personnel during their respective careers; give number of fire personnel attaining each lever of State certification)

d. Fire Prevention

- 1) Fire Prevention Personnel:  
(give number of fire personnel assigned full-time responsibility for fire prevention activities and/or fire code enforcement; give number of prevention personnel who have authority to issue warrants and make arrests in accordance with applicable State statutes)
- 2) Fire Code:  
(give date of adoption of locality's fire code)
- 3) ISO Rating:  
(give date of most recent ISO review; delineate the different ISO fire protection classification areas in the locality)
- 4) Fire Preplanning:  
(give examples of locality's fire preplanning activities)
- 5) Virginia Fire Incident Reporting System:  
(give date locality joined the Virginia Fire Incident Reporting System)
- 6) Fire Inspections:  
(give number of formal fire safety inspections conducted during previous calendar year)
- 7) Fire Prevention Programs:  
(give number of formal fire prevention programs presented during previous calendar year)

e. Emergency Dispatching Services:

(describe emergency dispatching services available to fire department)

f. Fire Hydrants:

(give number and general location of fire hydrants connected to county/authority-owned water distribution lines in locality)

g. Fire Brigades:

(give number and sponsor of each organized private fire brigade operating in locality)

h. Interlocal Agreements:

(describe nature and significance of each interlocal agreement or contract affecting fire services in locality)

i. Local Expenditures:

(give per capita local expenditure for fire services for most recent fiscal year)

- j. Funding Sources:  
[if fire department is funded by more than one jurisdiction, give amount of funds (exclusive of intergovernmental aid) or services each participating locality has contributed to the operating and capital expenses of the fire department for the current and previous five fiscal years]

3. Area Proposed for Annexation (APA)

- a. Fire Response:  
(give location of each fire station with first-run response responsibility for each component of the APA; give average response time to fire calls within APA for current and each of the previous five calendar years)
- b. ISO Rating:  
(delineate the different ISO fire protection classification areas in APA)
- c. Fire Hydrants:  
(give number and general location of fire hydrants connected to municipally-owned and county/authority-owned water distribution lines in APA; give the number of those fire hydrants connected to water distribution lines with a size of less than six-inches)
- d. Funding Sources:  
(for each fire company serving APA, give amount of funds or services the municipality and/or county has contributed to the operating and capital expenses of the fire department for the current and previous five fiscal years)

G. Public Recreation

1. Municipality

- a. Recreational Facilities
  - 1) Description of Sites:  
(list each municipally-owned recreation site serving the locality; give location, ownership, total acreage of each site; give acreage of each site actually developed for recreational purposes)
  - 2) Recreational Facilities and Equipment:  
(list the recreational facilities and major equipment located at each recreational site)
  - 3) Hours of Operation:  
(list hours of operation of each site or major facility)



- 4) Other Recreational Facilities:  
(list and describe other notable public or private recreational sites or facilities in locality)
- b. Recreation Staff:  
(give number of full-time, part-time, and seasonal employees on locality's recreation staff; give brief description of structure of staff and principal responsibilities of each staff component)
- c. Recreational Programs
  - 1) Description of Programs:  
(list each of the public recreational programs offered by locality during previous calendar year; indicate recreational sites at which each of the programs was offered)
  - 2) Fees and Charges:  
(list fees assessed residents and nonresidents for participation in locality's recreational programs or for use of its recreational sites or facilities)
  - 3) Participation in Recreational Programs:  
(give number of resident and nonresident participants in each program or utilizing locality's recreational facilities during previous calendar year)
  - 4) Special Recreational Services:  
(describe recreational services specially designed for the elderly and handicapped)
- d. Recreational Expenditures:  
(give per capita local expenditures for recreational services for most recent fiscal year)
- e. Interlocal Agreements:  
(describe nature and significance of any interlocal agreement or contract affecting recreational services in locality)
- f. Municipal Plans to Serve Area Proposed for Annexation:  
(describe municipality's plans to serve APA; list all projects, their anticipated costs, and implementation schedule)
2. County
  - a. Recreational Facilities
    - 1) Description of Sites:  
(list each county/authority-owned recreation site serving the locality; give location, ownership, total acreage of each site; give acreage of each site actually developed for recreational purposes)

- 2) Recreational Facilities and Equipment:  
(list the recreational facilities and major equipment located at each recreational site)
- 3) Hours of Operation:  
(list hours of operation of each site or major facility)
- 4) Other Recreational Facilities:  
(list and describe other notable public or private recreational sites or facilities in locality)
- b. Recreation Staff:  
(give number of full-time, part-time, and seasonal employees on locality's recreation staff; give brief description of structure of staff and principal responsibilities of each staff component)
- c. Recreational Programs
  - 1) Description of Programs:  
(list each of the public recreational programs offered by locality during previous calendar year; indicate recreational sites at which each of the programs was offered)
  - 2) Fees and Charges:  
(list fees assessed residents and nonresidents for participation in locality's recreational programs or for use of its recreational sites or facilities)
  - 3) Participation in Recreational Programs:  
(give number of resident and nonresident participants in each program or utilizing locality's recreational facilities during previous calendar year)
  - 4) Special Recreational Services:  
(describe recreational services specially designed for the elderly and handicapped)
- d. Recreational Expenditures:  
(give per capita local expenditures for recreational services for most recent fiscal year)
- e. Interlocal Agreements:  
(describe nature and significance of any interlocal agreement or contract affecting recreational services in locality)
3. Area Proposed for Annexation (APA)
  - a. Description of Sites:  
(describe all public recreation sites located in or within five road-miles of APA; give location, ownership, and total acreage)

- b. Recreational Facilities and Equipment:  
(list the recreational facilities and major equipment located at each recreational site in APA or within five road-miles of the APA)

## H. Libraries

### 1. Municipality

- a. Description of Public Library Facilities:  
(give location of each library facility serving the general public in locality; give total square footage, patron seating capacity, and hours of operation of each facility)
- b. Library Staff:  
(give number of full-time and part-time personnel employed at each municipal or municipally-supported facility; give number of such personnel having attained certification by American Library Association)
- c. Bookmobiles  
(give location of each bookmobile stop in locality; give schedule of bookmobile service for such stops)
- d. Library Operations
  - 1) Book Collection:  
(give total book collection in public library system serving locality)
  - 2) Circulation:  
(give total circulation; give total book circulation)
  - 3) Registered Borrowers:  
(give total registered borrowers utilizing public library system in locality; give number and jurisdiction of residence of nonresident borrowers)
- e. Interlocal Agreements:  
(describe nature and significance of any interlocal agreement or contract affecting library services in locality)
- f. Library Funding:  
(give total library revenues for most recent fiscal year; list separately amount of revenues derived from State and local sources for most recent fiscal year; give amount of local source revenue derived from general fund appropriation)
- g. Municipal Plans to Serve Area Proposed for Annexation:  
(describe municipality's plans to extend library services to APA)

2. County

- a. Description of Public Library Facilities:  
(give location of each library facility serving the general public in county; give total square footage, patron seating capacity, and hours of operation of each facility)
- b. Library Staff:  
(give number of full-time and part-time personnel employed at each county or county-supported facility; give number of such personnel having attained certification by American Library Association)
- c. Bookmobiles  
(give location of each bookmobile stop in county; give schedule of bookmobile service for such stops)
- d. Library Operations
  - 1) Book Collection:  
(give total book collection in public library system serving locality)
  - 2) Circulation:  
(give total circulation; give total book circulation)
  - 3) Registered Borrowers:  
(give total registered borrowers utilizing public library system in locality; give number and jurisdiction of residence of nonresident borrowers)
- e. Interlocal Agreements:  
(describe nature and significance of any interlocal agreement or contract affecting library services in locality)
- f. Library Funding:  
(give total library revenues for most recent fiscal year; list separately amount of revenues derived from State and local sources for most recent fiscal year; give amount of local source revenue derived from general fund appropriation)

3. Area Proposed for Annexation (APA)

- a. Description of Public Library Facilities:  
(give location of all county-owned or county-supported public library facilities located in APA or within five road-miles thereof; give total square footage, patron seating capacity, and hours of operation of each facility)

- b. LibraryStaff  
(give number of full-time and part-time personnel serving each county-owned or county-supported facility located in APA or within five road-miles thereof; give number of such personnel having attained certification by American Library Association)
- c. Bookmobiles:  
(give location of each bookmobile stop in APA; give schedule of bookmobile service for such stops)
- d. LibraryOperations
  - 1. BookCollection  
(give total book collections in each county-owned or county-supported facility located in APA or within five road-miles thereof)
  - 2. Circulation:  
(give total circulation at each such facility)

I. Curbs, Gutters, Sidewalks and Storm Drains

1. Municipality

- a. Presence of Facilities:  
(give percentage of public streets in locality having the following facilities)
  - 1) Curbs and Gutters
  - 2) Sidewalks
- b. Installation Policy:  
(describe municipal policy for the installation of each of the following facilities in new developments; describe policy for handling citizen-requested installation of each of the following facilities; give cost sharing formula for the installation of citizen-requested facilities as follows)
  - 1) Curbs and Gutters
  - 2) Sidewalks
  - 3) Storm Drains
- c. Installation of Facilities:  
(give linear feet of each of the following facilities installed by locality for each of the previous five fiscal years; give cost and source of funds for each project)

- 1) Curbs and Gutters
  - 2) Sidewalks
  - 3) Storm Drains
  - d. Drainage Problems:  
(give location of developed areas in locality with existing drainage problems)
  - e. Municipal Plans to Serve Area Proposed for Annexation (APA):  
(describe municipality's plans to install each of the following facilities in APA; list all projects, their anticipated costs, and implementation schedule)
    - 1) Curbs and Gutters
    - 2) Sidewalks
    - 3) Storm Drains
2. County
- a. Presence of Facilities:  
(give percentage of public streets in locality having the following facilities:
    - 1) Curbs and gutters
    - 2) Sidewalks
  - b. Installation Policy:  
(describe county policy for the installation of each of the following facilities in new developments; describe policy for handling citizen-requested installation of each of the following facilities; give cost sharing formula for the installation of citizen-requested facilities as follows)
    - 1) Curbs and Gutters
    - 2) Sidewalks
    - 3) Storm Drains
  - c. Installation of Facilities:  
(give linear feet of each of the following facilities installed by locality for each of the previous five fiscal years; give cost and source of funds for each project)

- 1) Curbs and Gutters
- 2) Sidewalks
- 3) Storm Drains

3. Area Proposed for Annexation (APA)

- a. Presence of Curbs and Gutters:  
(give location of public streets in APA containing publicly maintained curbs and gutters; indicate amount of total installed using county resources)
- b. Presence of Sidewalks:  
(give location of public streets in APA containing publicly maintained sidewalks; indicate amount of total installed using county resources)
- c. Drainage Problems:  
(give location of developed areas in APA with existing drainage problems)

J. Street Lighting

1. Municipality

- a. Number of Streetlights:  
(give number of publicly funded street lights in locality)
- b. Installation Policy:  
(describe municipal policy for the installation/operation of publicly funded street lights in new developments or along new thoroughfares; describe policy for handling citizen-requested installation/operation of street lights)
- c. Streetlighting Expenditures:  
(give amount expended by locality for the installation of streetlights for each of the previous five fiscal years; give amount expended by locality for the operation of streetlights for each of the previous five fiscal years)
- d. Municipal Plans to Serve Area Proposed for Annexation (APA):  
(describe municipality's plan to extend streetlighting services to the APA; list all projects, their anticipated costs, and implementation schedule)

2. County

- a. Number of Streetlights:  
(give number of publicly funded street lights in locality)

- b. Installation Policy:  
(describe county policy for the installation/operation of publicly funded street lights in new developments or along new thoroughfares; describe policy for handling citizen-requested installation/operation of street lights)
    - c. Streetlighting Expenditures:  
(give amount expended by locality for the installation of streetlights for each of the previous five fiscal years; give amount expended by locality for the operation of streetlights for each of the previous five fiscal years)
- 3. Area Proposed for Annexation (APA)
  - a. Number of Street Lights:  
(give number and location of publicly funded streetlights in APA; indicate which facilities were installed with county resources)
  - b. Streetlighting Problems:  
(identify locations in APA with distinct need for streetlights)

K. Snow Removal

- 1. Municipality
  - a. Snow Removal Equipment
    - 1) Publicly Owned:  
(give number and type of publicly-owned equipment utilized by municipality for snow removal)
    - 2) Privately Contracted:  
(give number and type of privately-contracted equipment utilized by municipality for snow removal)
  - b. Snow Removal Priorities:  
(describe municipal policy for snow clearance and removal from public thoroughfares; give locations assigned highest priority for snow removal)
  - c. Municipal Plans to Serve Area Proposed for Annexation (APA):  
(describe municipality's plans to extend snow removal services to APA; list all new equipment to be purchased, its anticipated costs and purchase schedule)



2. County

a. Snow Removal Equipment

- 1) County Owned:  
(give number and type of county-owned equipment utilized by county for snow removal)
- 2) State-Owned  
(give number and type of State-owned equipment utilized for snow removal in county; give location at which the equipment is stationed)
- 3) Privately Contracted:  
(give number and type of privately-contracted equipment utilized by county or State for snow removal)

- b. Snow Removal Priorities:  
(describe the county and/or State policies for establishing priority for snow removal in county)

3. Area Proposed for Annexation (APA)

- a. Equipment Serving APA:  
(list number and type of equipment serving APA; indicate ownership and place of location of each piece of such equipment)
- b. Snow Removal Priorities:  
(indicate thoroughfares in APA given highest priority for snow removal)

L. Street Maintenance

1. Municipality

- a. Total Road Mileage:  
(give total linear miles and lane-miles of primary and other public roadway in municipality)
- b. State Maintained Roads:  
(give total linear miles and lane-miles of primary and other public roadway in municipality maintained by State or eligible for State maintenance payments)
- c. Private Roads:  
(give total linear miles and lane-miles of privately maintained roads in municipality)

- d. Unpaved Roads
    - 1) Public Roads:  
(give total linear miles and lane-miles of unpaved publicly maintained roads)
    - 2) Private Roads:  
(give total linear miles and lane-miles of unpaved private roads)
  - e. Nontolerable Roads:  
[give total linear miles and lane-miles of primary and other public roads in municipality which do not meet "tolerable" roads standards of Virginia Department of Transportation (VDOT) express such non-tolerable roads as a percentage of total roads in each category]
  - f. Bridge Replacement:  
(give numbers and location of bridges needing replacement)
  - g. Street Maintenance Funding:  
[give total of funds provided by State to municipality for maintenance of primary and other public roadway (exclusive of snow removal) for past five fiscal years; give total local funds expended by municipality for maintenance of primary and other public roadway (exclusive of snow removal) for past five fiscal years]
  - h. Street Maintenance Staff:  
(give number of full-time and part-time employees of municipality engaged in street maintenance)
  - i. Street Maintenance Equipment:  
(give number and type of municipally-owned equipment utilized by municipality for street maintenance)
  - j. Maintenance Policy:  
(describe municipal policy for the assumption of maintenance responsibility for private streets)
  - k. Municipal Plans to Serve Area Proposed for Annexation (APA):  
(describe municipality's street maintenance and improvement plans to serve APA; list all projects, their anticipated costs and implementation schedule)
2. County
- a. Total Road Mileage:  
(give total linear miles and roadway in county)

- b. State Maintained Roads:  
(give total linear miles and lane-miles of primary and secondary roadway in county maintained by State or eligible for State maintenance)
  - c. Street Maintenance Funding:  
[give total of funds provided by State to county for maintenance of primary and other public roadway (exclusive of snow removal) for past five fiscal years; give total local funds expended by county for maintenance of primary and other public roadway (exclusive of snow removal) for past five fiscal years]
  - d. Street Maintenance Staff:  
(give number of full-time and part-time employees of county, if any, engaged in street maintenance)
  - e. Street Maintenance Equipment:  
(give number and type of publicly owned equipment utilized by county, if any, for street maintenance)
  - f. State Highway Maintenance Facilities:  
(give location of all VDOT facilities in locality)
3. Area Proposed for Annexation (APA)
- a. Total Road Mileage:  
(give total linear miles and lane-miles of primary and secondary roadway in APA)
  - b. State Maintained Roads:  
(give total linear miles and lane-miles of primary or secondary roadway maintained by State or eligible for State maintenance in APA)
  - c. Private Roads:  
(give total linear miles and lane-miles of privately maintained roads in APA)
  - d. Unpaved Roads
    - 1) Public Roads:  
(give total linear miles and lane-miles of unpaved public roads in APA)
    - 2) Private Roads:  
(give total linear miles and lane-miles of unpaved private roads in APA)
  - e. Non-tolerable Roads:  
(give total linear miles and lane-miles of primary and secondary roads in APA which do not meet VDOT's "tolerable" roads standards)

- f. Bridge Replacement:  
(give number and location of bridges needing replacement in APA)
- g. Six-Year Plan  
(list all transportation projects on county's adopted six-year road plan that are located in APA)

## VII. COMMUNITY OF INTEREST

### A. Municipality and Area Proposed for Annexation (APA)

1. Urban Services:  
(describe those urban services provided directly by municipality to APA; indicate those services provided pursuant to interlocal cooperative agreement; delineate specific areas provided each service; give number of APA/County residents using services/facilities provided by municipality)
2. Employment
  - a. Nonresident Workers:  
(give number of residents of county and of APA specifically employed in municipality)
  - b. Municipal Residents Working Outside Municipality:  
(give number of residents of municipality employed in county and in APA specifically)
  - c. Employment Centers:  
(identify five largest employers in municipality; give number of employees of each)
3. Retail Trade
  - a. Number:  
(give number of retail establishments in municipality; state as percentage of municipality-county total of such establishments)
  - b. Employment:  
(give number of persons employed in retail trade sector in municipality)
  - c. Retail Sales:  
(give total retail sales in municipality; state as percentage of municipality-county total of such sales)
  - d. Shopping Areas:  
(give location of any major retail trade centers in municipality)
4. Wholesale Trade
  - a. Number  
(give number of wholesale establishments in municipality; state as percentage of municipality-county total of such establishments)
  - b. Employment  
(give number of persons employed in wholesale trade sector in municipality)

- c. Wholesale Trade Sales:  
(give total wholesale sales in municipality; state as percentage of municipality-county total of such sales)
- 5. Service Industries
  - a. Number  
(give number of service establishments in municipality; state as percentage of municipality-county total of such establishments)
  - b. Employment  
(give number of persons employed in service sector in municipality)
  - c. Service Industries Sales:  
(give total service sector sales in municipality; state as percentage of municipality-county total of such sales)
- 6. Financial Institutions
  - a. Number  
(give number of banks and savings and loan institutions in municipality)
  - b. Deposits  
(give total dollar amount of deposits in all financial institutions in municipality)
- 7. Medical Facilities
  - a. Hospitals  
(briefly describe facilities located at hospitals in municipality, including total number of beds and number of doctors affiliated)
  - b. Hospital Usage:  
(give data concerning usage of hospital by residents of adjacent jurisdictions)
  - c. Medical Profession:  
(give number of doctors, dentists and other medical professionals who maintain offices in municipality)
  - d. Pharmacies  
(give number of pharmacies or drug stores located in municipality)
- 8. Other Professional Services:  
(give number of attorneys, accountants, architects, psychologists, or other professionals who maintain offices in municipality)
- 9. Religious Facilities:  
(give number of churches or other religious facilities in municipality which serve general area)

10. Social Service Organizations:  
(give number of social service organizations in municipality which serve general area; give examples of various types)
11. Service and Social Clubs:  
(give number of service and/or social clubs in municipality which draw membership from general area; give examples of various types)
12. Governmental Services
  - a. State  
(list those State governmental offices or facilities in municipality serving general area)
  - b. Federal:  
(list those federal governmental offices or facilities in municipality serving general area)
  - c. Local  
(list those local governmental offices or facilities in municipality serving general area)
13. Development Factors
  - a. Density:  
(compare population density of municipality to that of APA)
  - b. Land Use Patterns:  
(identify land use patterns which extend from within municipality into APA)
  - c. Barriers  
(identify any natural or man-made barriers which promote ties between municipality and APA)
14. Other Factors
  - a. School Attendance:  
(give number of students in county, and in APA specifically attending schools in municipality)
  - b. Citizen Surveys:  
(give results of any community of interest survey conducted by municipality, county, or other entity)
  - c. Other Institutions or Facilities:  
(identify any other large public or private institutions or facilities in municipality, such as colleges or military bases, which impact on community of interest)

- d. Usage of Municipal Facilities:  
(give number of residents of county or APA who utilize municipal facilities such as recreation centers, etc.)

B. County and Area Proposed for Annexation (APA)

1. Urban Services:  
(describe those urban services provided directly by county to APA; indicate those services provided pursuant to interlocal cooperative agreement; delineate specific areas provided each service)
2. Employment
  - a. Nonresident Workers:  
(give number of residents of APA employed in other portions of county)
  - b. County Residents Working in APA:  
(give number of residents of remaining portion of county employed in APA specifically)
  - c. Employment Centers:  
(identify five largest employers in county; give number of employees of each)
3. Retail Trade
  - a. Number:  
(give number of retail establishments in county; state as percentage of municipality-county total of such establishments)
  - b. Employment  
(give number of persons employed in retail trade sector in county)
  - c. Retail Sales:  
(give total retail sales in county; state as percentage of municipality-county total of such sales)
  - d. Shopping Areas:  
(give location of any major retail trade centers in county)
4. Wholesale Trade
  - a. Number  
(give number of wholesale establishments in county; state as percentage of municipality-county total of such establishments)
  - b. Employment  
(give number of persons employed in wholesale trade sector in county)



- c. Wholesale Trade Sales:  
(give total wholesale sales in county; state as percentage of municipality -county total of such sales)
- 5. Service Industries
  - a. Number  
(give number of service establishments in county; state as percentage of municipality-county total of such establishments)
  - b. Employment  
(give number of persons employed in service sector in county)
  - c. Service Industries Sales:  
(give total service sector sales in county; state as percentage of municipality-county total of such sales)
- 6. Financial Institutions
  - a. Number  
(give number of banks and savings and loan institutions in county)
  - b. Deposits  
(give total dollar amount of deposits in all financial institutions in county)
- 7. Medical Facilities
  - a. Hospitals  
(briefly describe facilities located at hospitals in county, including total number of beds and number of doctors affiliated)
  - b. Hospital Usage:  
(give data concerning usage of hospital by residents of APA and adjacent jurisdictions)
  - c. Medical Profession:  
(give number of doctors, dentists and other medical professionals who maintain offices in county)
  - d. Pharmacies  
(give number of pharmacies or drug stores located in county)
- 8. Other Professional Services:  
(give number of attorneys, accountants, architects, psychologists, or other professionals who maintain offices in county)
- 9. Religious Facilities:  
(give number of churches or other religious facilities in county which serve APA)

10. Social Service Organizations:  
(give number of social service organizations in county which serve APA; give examples of various types)
11. Service and Social Clubs:  
(give number of service and/or social clubs in county which draw membership APA; give examples of various types)
12. Governmental Services
  - a. State  
(list those State governmental offices or facilities in county serving general area)
  - b. Federal:  
(list those federal governmental offices or facilities in county serving general area)
  - c. Local  
(list those local governmental offices or facilities in county serving general area)
13. Development Factors
  - a. Density:  
(compare population density of county overall to that of APA)
  - b. Barriers  
(identify any natural or man-made barriers which promote ties between APA and remaining portion of county)
14. Other Factors
  - a. School Attendance:  
(delineate county school attendance zones which affect APA)
  - b. Citizen Surveys:  
(give results of any community of interest survey conducted by municipality, county, or other entity)
  - c. Other Institutions or Facilities:  
(identify any other large public or private institutions or facilities in county, such as colleges or military bases, which impact on community of interest)
  - d. Agricultural Operations:  
(describe relationship between agricultural properties located in outlying portions of county and APA)

C. Area Proposed for Annexation (APA)

1. Employment  
(identify five largest employers in APA; give number of employees of each)
2. Retail Trade
  - a. Number  
(give number of retail establishments in APA; state as percentage of county total)
  - b. Employment  
(give number of persons employed in retail trade sector in APA; state as percentage of county total)
  - c. Retail Sales:  
(give total retail sales in APA; state as percentage of county)
  - d. Shopping Areas:  
(give location of any major retail trade centers in APA)
3. Wholesale Trade
  - a. Number  
(give number of wholesale establishments in APA; state as percentage of county total)
  - b. Employment:  
(give number of persons employed in wholesale trade sector in APA)
  - c. Wholesale Trade Sales:  
(give total wholesale sales in APA; state as percentage of county total)
4. Service Industries
  - a. Number:  
(give number of service establishments in APA; state as percentage of county total)
  - b. Employment:  
(give number of persons employed in service sector in APA; state as percentage of county total)
  - c. Service Industries Sales:  
(give total service sector sales in APA; state as percentage of county total)
5. Financial Institutions:  
(give number of banks and savings and loan institutions in APA)

6. Medical Facilities
  - a. Hospitals  
(describe facilities located at hospitals in APA)
  - b. Medical Profession:  
(give number of doctors, dentists, and other medical professionals who maintain offices in APA)
  - c. Pharmacies:  
(give number of pharmacies or drug stores located in APA)
7. Other Professional Services:  
(give number of attorneys, accountants, architects, psychologists, or other professionals who maintain offices in APA)
8. Religious Facilities:  
(give number of churches or other religious facilities in APA)
9. Social Service Organizations:  
(give number of social service organizations in APA; give examples of various types)
10. Service and Social Clubs:  
(give number of service and/or social clubs in APA which draw membership from general area; give examples of various types)
11. Governmental Services
  - a. Local  
(list those local governmental offices or facilities in APA)
  - b. State  
(list those State governmental offices or facilities in APA serving general area)
  - c. Federal  
(list those federal governmental offices or facilities in APA)
12. Other Factors
  - a. Other Institutions or Facilities:  
(identify any other large public or private institutions or facilities in APA such as colleges or military bases, which impact on community of interest)

## VIII. COMPLIANCE WITH STATE POLICIES

### A. Municipality

#### 1. Public Planning

- a. Planning Commission:  
(give date of establishment of planning commission)
- b. Comprehensive Plan:  
(give date of adoption of current comprehensive plan; give date of last formal review of comprehensive plan by planning commission since adoption as required by Section 15.2-2230, Code of Va.)
- c. Evaluation of Planning Instrument:  
(determine if comprehensive plan complies with provisions of Art. 3, Chapt. 22, Title 15.2, Code of Virginia; identify reasons for noncompliance)
- d. Subdivision Ordinance:  
(give date of adoption of current subdivision ordinance; give date of last major revision of ordinance)
- e. Evaluation of Ordinance:  
(determine if subdivision ordinance complies with provisions of Art. 6, Chapt. 22, Title 15.2, Code of Virginia; identify reasons for noncompliance)
- f. Subsidiary Planning Efforts:  
(describe any other notable planning efforts of locality)

#### 2. Agricultural Land Preservation

- a. Comprehensive Planning:  
(describe provisions in locality's comprehensive plan and land use regulations which protect or preserve agricultural lands)
- b. Use Value Assessment:  
(give date of adoption of use value assessment; give categories of uses subject to use value assessment; give amount of locality's real estate assessed value deferred by use value assessment for most recent tax year)
- c. Agricultural and Forestal Districts:  
(give date of establishment of agricultural and forestal districts program; give number and total acreage of agricultural and forestal districts in locality)

3. Housing

- a. Housing Authority:  
(give date of establishment of locality's redevelopment and housing authority; describe services provided by redevelopment and housing authority; give number of housing units owned or managed by redevelopment and housing authority; describe other assisted housing programs administered by redevelopment and housing authority)
- b. Other Public Housing Efforts:  
(give number of publicly funded but privately administered assisted housing units in locality by program type)
- c. Housing Maintenance Code:  
(give date of adoption of housing maintenance code)

4. Public Transportation:

(describe any non-school public transportation services offered by locality; give fares, routes, hours of operation, expenditures, sources of revenue, and special services for the elderly and handicapped; describe municipality's plans to extend public transportation services to areas annexed)

5. Public Education (Applicable only to cities and towns constituting a separate school division)

- a. Standards of Quality:  
(determine if locality's school division meets the Standards of Quality established by Virginia General Assembly; identify any deficiencies)
- b. State Accreditation:  
[give number and level of schools accredited by Virginia Department of Education (VDOE)]
- c. National Accreditation:  
(give number and level of schools accredited by Southern Association of Colleges and Universities or other accreditation organization)
- d. Pupil-Teacher Ratio:  
(give pupil-teacher ratio for elementary and secondary levels)
- e. Instructional Personnel:  
(give instructional personnel per 1,000 students in average daily membership for elementary and secondary levels)
- f. Graduation Rates:  
(give percentage of graduates continuing education; give percentage of graduates not continuing education but having marketable skills)

- g. Standardized Testing  
(give most recent results from the Virginia Standards of Learning tests)
- h. Educational Expenditures:  
(give total expenditure's per pupil for operations for most recent school year; give local expenditures per pupil for operations for same year)
- i. Pupil Transportation:  
(describe the pupil transportation program of locality; give minimum travel distance required for eligibility for school transportation)
- j. Evaluation of Local Educational Program:  
(give date of most recent administrative review of locality's school division; describe any deficiencies present in locality's educational facilities or programs; describe any innovative or notable educational program offered by the locality's school division)
- k. Educational Services to Area Proposed for Annexation (APA):  
(describe locality's plans to extend educational services to APA)

B. County

1. Public Planning

- a. Planning Commission:  
(give date of establishment of planning commission)
- b. Comprehensive Plan:  
(give date of adoption of current comprehensive plan; give date of last formal review of comprehensive plan by planning commission since adoption as required by Section 15.2-2230, Code of Va.)
- c. Evaluation of Planning Instrument:  
(determine if comprehensive plan complies with provisions of Art. 3, Chapt. 22, Title 15.2, Code of Virginia; identify reasons for noncompliance)
- d. Subdivision Ordinance:  
(give date of adoption of current subdivision ordinance; give date of last major revision of ordinance)
- e. Evaluation of Ordinance:  
(determine if subdivision ordinance complies with provisions of Art. 6, Chapt. 22, Title 15.2, Code of Virginia; identify reasons for noncompliance)
- f. Subsidiary Planning Efforts:  
(describe any other notable planning efforts of locality)

2. Agricultural Land Preservation

- a. Comprehensive Planning:  
(describe provisions in locality's comprehensive plan and land use regulations which protect or preserve agricultural lands)
- b. Use Value Assessment:  
(give date of adoption of use value assessment; give categories of uses subject to use value assessment; give amount of locality's real estate assessed value deferred by use value assessment for most recent tax year)
- c. Agricultural and Forestal Districts:  
(give date of establishment of agricultural and forestal districts program; give number and total acreage of agricultural and forestal districts in locality)

3. Housing

- a. Housing Authority:  
(give date of establishment of locality's redevelopment and housing authority; describe services provided by redevelopment and housing authority; give number of housing units owned or managed by redevelopment and housing authority; describe other assisted housing programs administered by redevelopment and housing authority)
- b. Other Public Housing Efforts:  
(give number of publicly funded but privately administered assisted housing units in locality by program type)
- c. Housing Maintenance Code:  
(give date of adoption of housing maintenance code)

4. Public Transportation:

(describe any non-school public transportation services offered by locality; give fares, routes, hours of operation, expenditures, sources of revenue, and special services for the elderly and handicapped; describe municipality's plans to extend public transportation services to areas annexed)

5. Public Education

- a. Standards of Quality:  
(determine if locality's school division meets the Standards of Quality established by Virginia General Assembly; identify any deficiencies)
- b. State Accreditation:  
(give number and level of schools accredited by VDOE)



- c. National Accreditation:  
(give number and level of schools accredited by Southern Association of Colleges and Universities or similar accreditation organization)
- d. Pupil-Teacher Ratio:  
(give pupil-teacher ratio for elementary and secondary levels)
- e. Instructional Personnel:  
(give instructional personnel per 1,000 students in average daily membership for elementary and secondary levels)
- f. Graduation Rates:  
(give percentage of graduates continuing education; give percentage of graduates not continuing education but having marketable skills)
- g. Standardized Testing:  
(give most recent results from the Virginia Standards of Learning tests)
- h. Educational Expenditures:  
(give total expenditure's per pupil for operations for most recent school year; give local expenditures per pupil for operations for same year)
- i. Pupil Transportation:  
(describe the pupil transportation program of locality; give minimum travel distance required for eligibility for school transportation)
- j. Evaluation of Local Educational Program:  
(give date of most recent administrative review of locality's school division; describe any deficiencies present in locality's educational facilities or programs; describe any innovative or notable educational program offered by the locality's school division)

IX. ARBITRARY REFUSAL TO COOPERATE

- A. Interlocal Cooperation:  
(give examples of services or programs provided by cooperative agreement between municipality and county; identify any events or activities cited by municipality or county as example of arbitrary refusal to cooperate in the provision of public services)

## X. MUNICIPALITY'S ABILITY TO FINANCE ANNEXATION

### A. Prospective Development of APA

1. Residential Development of APA:  
(give current number of undeveloped platted subdivision lots in APA; give number of proposed subdivisions/subdivision lots in APA currently under review by county)
2. Population Growth in APA:  
(give current population and estimated annual population growth in APA during ten-year period after proposed annexation)
3. School-age Population:  
(give current school-age population and estimated annual school-age population growth in APA during the ten-year period after proposed annexation)
4. Nonresidential Development in APA:  
(describe proposed or anticipated major nonresidential development in APA which will have a substantial impact on municipal services; estimate the impact of such development on roads, utilities, and other public facilities)

### B. Cost of Facilities and Services to Accommodate Annexation

1. Capital Costs:
  - a. General Fund Projects  
(give total cost of general fund capital projects proposed for construction/purchase during the ten-year period following annexation for the purpose of serving the APA; give schedule for the construction of each project, the annual outlay required for each, and the total cost for the construction of each project; indicate the manner by which the various capital costs will be funded)
  - b. Enterprise Fund Projects  
[give total cost of enterprise fund capital projects (e.g., water and sewer) proposed for construction during the ten-year period following annexation for the purpose of serving the APA; give schedule for the construction of each project, the annual outlay required for each, and the total cost for the construction of each project; indicate the manner by which the various capital costs will be funded)
2. Operational Cost:
  - a. General Fund  
[give total operational cost for extension of general governmental services to the APA for each major functional area (e. g., education, law enforcement, fire services, recreation, public works, etc.) and total operational expenditures for all such services for each year of the ten-year period following the proposed annexation]

- b. Enterprise Fund  
[give total operational cost for extension of each enterprise fund service to the APA and total operational expenditures for all such services for each year of the ten-year period following the proposed annexation]
- C. Anticipated Revenues from the APA
  - 1. Local Revenue Receipts:  
(give total of anticipated revenue receipts from the APA for each local revenue source for each year of the ten-year period following annexation)
  - 2. Intergovernmental Aid:  
(list each source of anticipated intergovernmental aid and estimate the additional receipts from each source which will be received by the municipality as a result of the annexation of the APA for each year of the ten-year period following annexation)
- D. Funding of Facilities and Services for APA  
(if the anticipated revenues from the APA are inadequate to support the construction of facilities and extension of services for that area, indicate how the municipality will cover the deficiency in its general fund and/or enterprise fund)
- E. Impact of Annexation on Enterprise Funds  
[give the impact of the annexation on the municipality's enterprise funds (e.g., water, sewer, and/or solid waste) from the equalization of utility rates; state all assumptions and indicate where data is projected]
- F. Fiscal Impact of Proposed Annexation  
(give the fiscal impact of proposed annexation on an average resident of APA)

## XI. DOCUMENTS

- A. One copy of the below listed documents are to be provided by the municipality and county:
1. Audit reports for most recent fiscal year available and each of the four preceding fiscal years.
  2. Current adopted budget.
  3. Adopted Comprehensive Plan.
  4. Most recently adopted capital improvements plan.
  5. Current adopted zoning and subdivision ordinances.
  6. Waterworks operating permit from the Virginia Department of Health for the municipal or county/authority water system; include Engineering Description Sheet and any correspondence exchanged with State officials concerning deficiencies in that water system.
  7. The Virginia Pollution Discharge Elimination System permit from the Virginia Department of Environmental Quality for the municipal or county/authority sewerage; include any correspondence exchanged with State officials concerning deficiencies in that sewer system.
  8. Any plans for improvements to either the water or sewer systems (e.g., preliminary engineering report); give the current status of the recommendations contained in any such plans.
  9. Any interlocal agreements which have bearing on the proposed annexation.
  10. Any study which examines the fiscal impact of the proposed annexation.
  11. Any other plans, document, or subsidiary planning instruments which the municipality or county determines to bear upon the proposed annexation.